

Manage Peer Access Permissions

1 Introduction

Institutions seeking funding from the Department of Energy's (DOE) Office of Science (SC), or with active funding, will have a variety of Preproposals, Letters of Intent (LOIs), Proposals, and Awards. Throughout the lifecycle of any of these resources, a user within the organization may require access to assist with a submission or related activities. The Admin Sponsored Research Officer (SRO) at the institution has permissions to Manage Peer Access, granting users at the institution permissions to view, edit, delete, submit, or manage peer access themselves.

The purpose of this document is to provide step-by-step instructions for users to follow to Manage Peer Access for users registered to their institution.

2 Prerequisites

Before a user can Manage Peer Access, the following criteria must be met:

- The user has an active, external PAMS account.
 - The user is an Admin SRO at the institution with the Manage Users, Submit to DOE, and Manage Institution Profile Permissions.
- OR**
- The user has Manage Users Privileges, or has submitted the resource (Preproposal, LOI, Proposal).

3 Managing Peer Access

Most often, peer access is managed by resource. Use the following steps to Manage Peer Access for Preproposals, Letters of Intent (LOI), Proposals, and Awards.

1. Log in to your external PAMS account at (Figure 1): <https://pamspublic.science.energy.gov/webpamsepsexternal/login.aspx>

Figure 1. PAMS External Login

2. PAMS will load the homepage (Figure 2). From here, you must decide which resource you would like to manage. To manage Preproposals, continue to the next section. To manage LOIs, skip ahead to [Section 3.2 Manage Letters of Intent \(LOI\)](#). To manage Proposals, skip ahead to [Section 3.3 Manage Proposals](#). To manage Awards, skip ahead to [Section 3.4 Manage Awards](#).

3.1 Managing My Preproposals

Use the following steps to manage peer access for Preproposals.

1. Click **View My Preproposals** under the "Common Actions" section on the right side of the page (Figure 2).

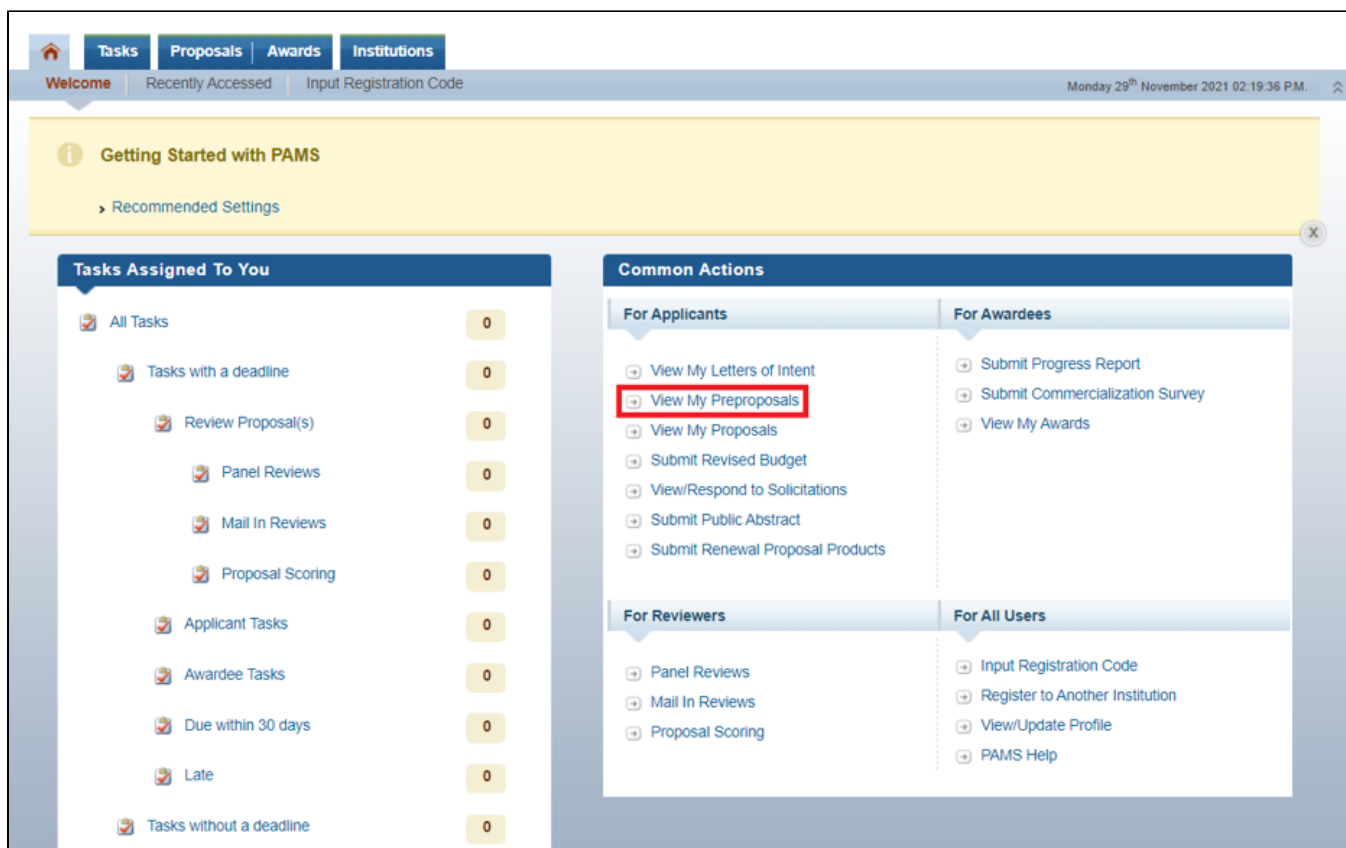


Figure 2. PAMS Homepage, View My Preproposals

2. PAMS will navigate you to the “My Preproposals” page, which lists all of the Preproposals assigned to you in PAMS. Browse the list or use the filters or advanced search above the grid to locate the Preproposal for which you would like to manage peer access. Once you have located the Preproposal, click **Manage Peer Access** in the **Actions/Views** menu in the Options column (Figure 3).

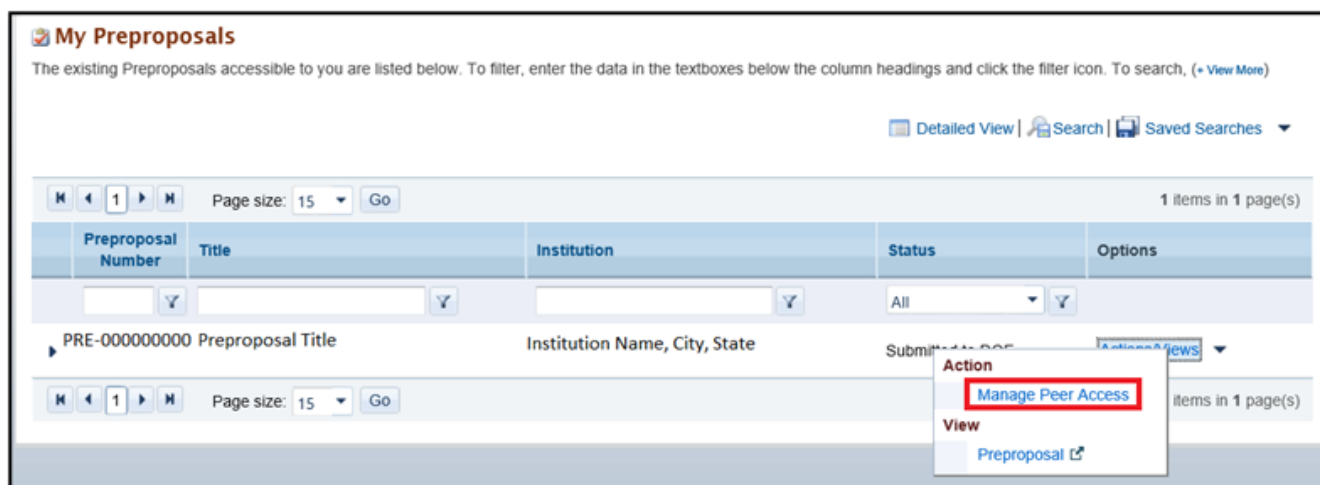


Figure 3. My Preproposals, Manage Peer Access

3. PAMS will navigate you to the “Manage Peer Access – User List” page, which lists every user with access to the Preproposal (Figure 4).

Manage Peer Access - User List

The users with access to this Preproposal are listed below. To filter, enter the data in the textboxes below the column headings and click the filter icon. To search, click the Search link above the grid. Click the arrow in the Options column to see all available actions. Click the Add New Person link above the grid to add a new person.

PRE-0000000000: Preproposal Title Status: Submitted to DOE

FOA: DE-FOA-0000000: Solicitation Title Institution: Institution Name, City, State

PI: Last Name, First Name Submitted By: Last Name, First Name Submitted On: 9/4/2020 08:40 PM ET

Due Date: 9/30/2020 11:59 PM ET PM: Last Name, First Name

[Add New Person](#) Search

Name	User Name	Email	Phone Number	Role	Options
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name, First Name	User Name	Email Address	000-000-0000	Communication Contact, SRO/BC	Action
Last Name, First Name	User Name	Email Address	000-000-0000	r, P	Manage Peer Access

Page size: 15 2 items in 1 page(s)

[Return to List Page](#)

Figure 4. Manage Peer Access – User List, Manage Peer Access By Preproposal

3.1.1 Managing Peer Access for Preproposals

Use the following steps to manage a user who already has access to the Preproposal.

1. Browse the list or use the filters or advanced search above the grid to locate the user whose access you would like to manage. Once you have located the user, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 4).
2. PAMS will navigate you to the “Manage Peer Access – User” page, which displays the user’s current permissions on the Preproposal. All users, including new users, on the Preproposal will possess the View permission, but current users may also possess the Edit, Submit, Delete, or Manage Peer Access permissions. Select the checkbox for each additional permission you would like to grant the user(s) (Figure 5).
3. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page (Figure 5).

Manage Peer Access - User

This page enables you to add or remove preproposal peer-access privileges for user(s). For the "Update Peer Access" section, click the appropriate checkbox next to the peer - access privilege to add it for the user. If the checkbox is already checked, clicking it again will remove the checkmark along with the user's privilege. Once you finish, click the Save and Continue button to save the changes. Click the Cancel button at any time to stop this action. [View Less](#)

PRE-0000000000: Preproposal Title **Status: Submitted to DOE**

FOA: DE-FOA-0000000: Solicitation Title **Institution: Institution Name, City, State**

PI: Last Name, First Name **Submitted By: Last Name, First Name** **Submitted On: 9/4/2020 08:40 PM ET**
Due Date: 9/30/2020 11:59 PM ET **PM: Last Name, First Name**

User Information

Names	First Name Last Name, First Name Last Name
Update Peer Access	<p>The selected privileges will be assigned to all users shown above.</p> <p><input checked="" type="checkbox"/> View</p> <p><input type="checkbox"/> Edit</p> <p><input type="checkbox"/> Submit</p> <p><input type="checkbox"/> Delete</p> <p><input type="checkbox"/> Manage Peer Access</p>

[Cancel](#) [Save and Continue](#)

Figure 5. Manage Peer Access – User, Update Peer Access By Preproposal

4. PAMS will return you to the "Manage Peer Access – User List" page and display a Success message confirming that the user's peer access privileges have been updated successfully (Figure 6).

Manage Peer Access - User List

The users with access to this Preproposal are listed below. To filter, enter the data in the textboxes below the column headings and click the filter icon. To search, click the Search link above the grid. Click the arrow in the Options column to see all available actions. Click the Add New Person link above the grid to add a new person.

Success:
Successfully updated peer access privileges.

Figure 6. Manage Peer Access – User List, Success

3.1.2 Adding a User to the Preproposal

If you do not see the user whose access you would like to manage in the list (Figure 4), the user does not have access to the Preproposal. Use the following steps to add a user to the Preproposal.

1. Click **Add New Person** on the left above the grid to add one or more user(s) to the preproposal and manage their access (Figure 4).
2. PAMS will navigate you to the "Manage Peer Access – Add User" page, which lists users from your institution that do not currently have access to the Preproposal. Browse the list or use the filters or advanced search above the grid to locate the user(s) whose access you would like to add. Use the checkboxes by the users' names or the **Select all/Unselect all** feature to select the user(s) you want to add to the Preproposal. (Figure 7)
3. Once you have selected the user(s), click **Add All Users** at the bottom right of the page.

Manage Peer Access - Add User

Use the Search Filters to find the user(s) to add to this proposal. Click the "Add All Users" button to add the user(s) to the proposal. The user must already have a PAMS account to appear in the list.

PRE-0000000000: Preproposal Title

Status: Awarded

FOA: DE-FOA-0000000000: Solicitation Title

Institution: Institution Name, City, State

Type: Supplemental

PI: Last Name, First Name

PM: Last Name, First Name

Submitted By: User, GrantsGov

Submitted On: 6/19/2020 07:39 AM ET

Due Date: 9/30/2020 11:59 PM ET

SRO/BO/AO: Last Name, First Name

Search

This page: [Select all](#) [Unselect all](#) 0 Persons Selected (View) | Across pages: [Select all](#) [Unselect all](#)

1

Page size: 15 Go

4 items in 1 page(s)

Select / Unselect	Name	Email	Phone Number	Role
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	SRO/BO/AO
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	Other
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	PI
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	Other

1

Page size: 15 Go

4 items in 1 page(s)

[Return To List Page](#)
[Add All Users](#)

Figure 7. Manage Peer Access – Add User By Preproposal

4. PAMS will return you to the "Manage Peer Access – User" page, follow steps 2 - 4 in section 3.1.1, Managing Peer Access for Preproposals, to designate the appropriate privileges for the users you are adding to the Preproposal.

3.2 Managing My Letters of Intent (LOI)

Use the following steps to manage peer access on LOIs.

1. Click **View My Letters of Intent** under the "Common Actions" section on the right side of the page ([Figure 8](#)).

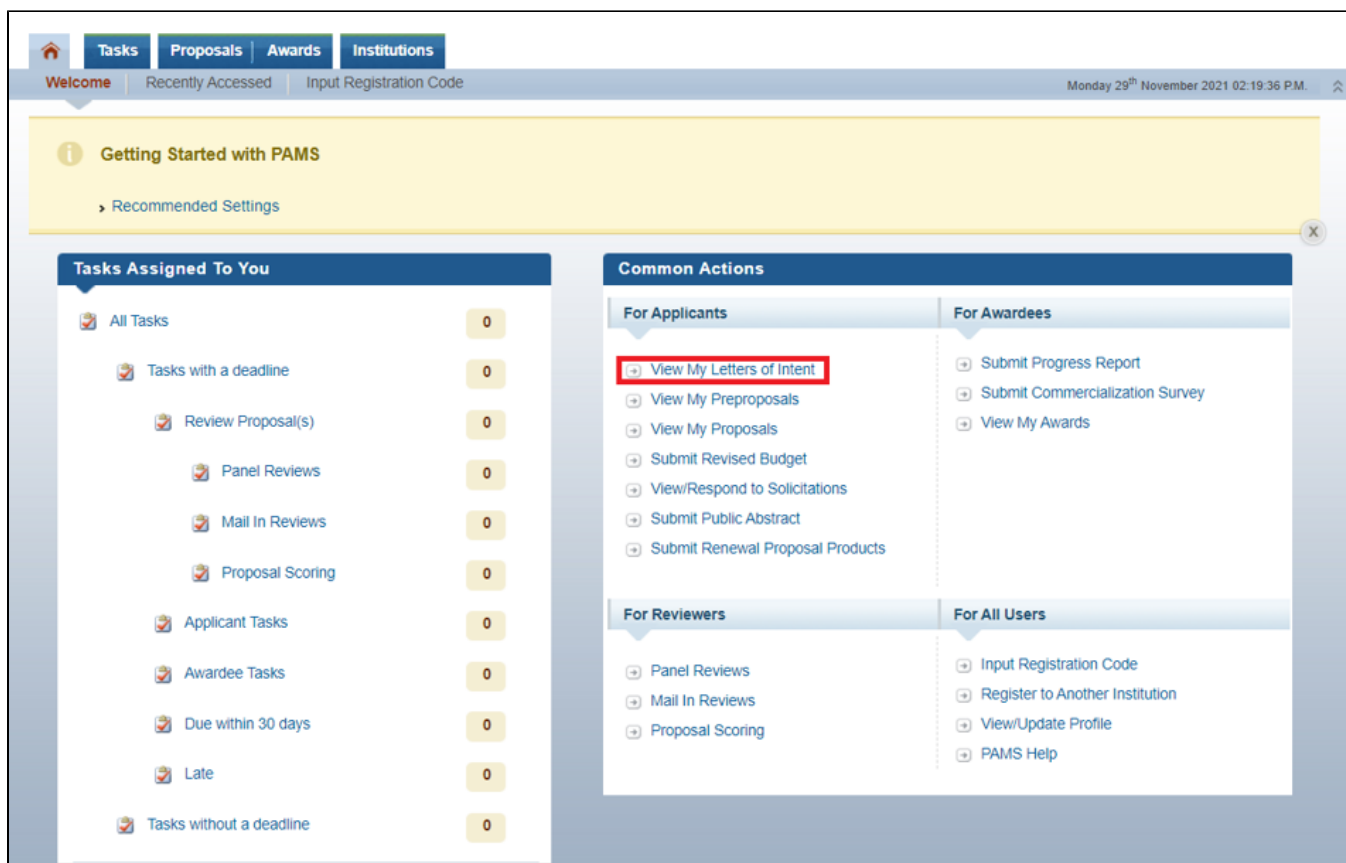


Figure 8. PAMS Homepage, View My Letters of Intent (LOI)

2. PAMS will navigate you to the “My Letters of Intent (LOI)” page, which displays all of the LOIs that are assigned to you in PAMS. Browse the list or use the filters or advanced search above the grid to locate the LOI for which you would like to manage peer access. Once you have located the LOI, click **Manage Peer Access** in the **Actions/Views** menu in the Options column (Figure 9).

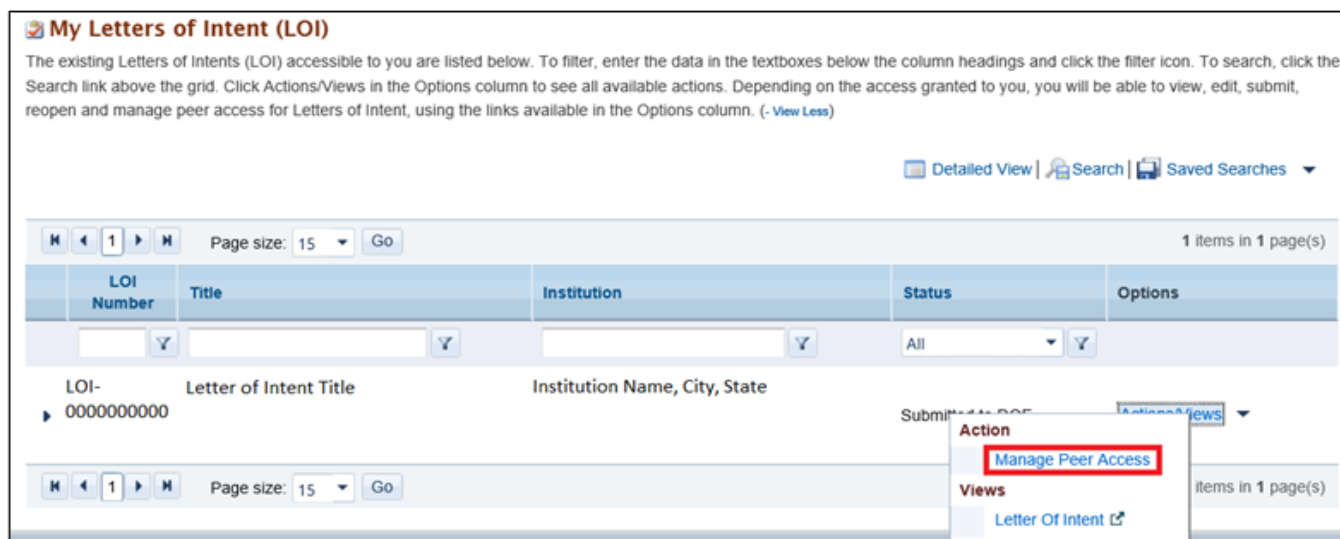


Figure 9. My Letters of Intent (LOI), Manage Peer Access

3. PAMS will navigate you to the “Manage Peer Access – User List” page, which lists every user with access to the LOI (Figure 10).

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Figure 10. Manage Peer Access – User List, Manage Peer Access By LOI

3.2.1 Managing Peer Access for LOIs

Use the following steps to manage a user who already has access to the LOI.

1. Browse the list or use the filters or advanced search above the grid to locate the user whose access you would like to manage. Once you have located the user, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 10).
2. PAMS will navigate you to the "Manage Peer Access – User" page, which displays the user's current permissions on the LOI. All users, including new users, on the LOI will possess the View permission, but current users may also possess the Edits, Submit, Delete, or Manage Peer Access permissions. Select the checkbox for each additional permission you would like to grant the user(s) (Figure 11).
3. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page.

Manage Peer Access - User

This page enables you to add or remove LOI peer-access privileges for user(s). For the "Update Peer Access" section, click the appropriate checkbox next to the peer-access privilege to add it for the user. If the checkbox is already checked, clicking it again will remove the checkmark along with the user's privilege. Once you finish, click the Save and Continue button to save the changes. Click the Cancel button at any time to stop this action. (- [View Less](#))

▼ LOI-0000000000: Title Status: Submitted to DOE

FOA: DE-FOA-0000000: Solicitation Title Institution: Institution Name, City, State
 PI: Last Name, First Name Submitted By: Last Name, First Name Submitted On: 4/30/2019 03:37 PM ET
 Due Date: 5/30/2019 05:00 PM ET PM: Last Name, First Name

User Information

Names: First Name Last Name, First Name Last Name

The selected privileges will be assigned to all users shown above.

☒ View

☐ Edit

☐ Submit

☐ Delete

☐ Manage Peer Access

Update Peer Access

[Cancel](#) [Save and Continue](#)

Figure 11. Manage Peer Access – Users Access, Permissions

4. PAMS will return you to the "Manage Peer Access – User List" page and display a Success message confirming that the user's peer access privileges have been updated successfully. (Figure 12)

Manage Peer Access - User List

The users with access to this LOI are listed below. To filter, enter the data in the textboxes below the column headings and click the filter icon. To search, click the Search link above the grid. Click the arrow in the Options column to see all available actions. Click the Add New Person link above the grid to add a new person.

✓ **Success:**
 Successfully updated peer access privileges.

Figure 12. Manage Peer Access – User List, Success

3.2.2 Adding a User to the LOI

If you do not see the user whose access you would like to manage in the list (Figure 10), the user does not have access to the LOI. Use the following steps to add a user to the LOI.

1. Click **Add New Person** on the left above the grid to add one or more user(s) to the LOI and manage their access (Figure 10).
2. PAMS will navigate you to the "Manage Peer Access – Add User" page, which lists users from your Institution that do not currently have access to the LOI. Browse the list or use the filters or advanced search above the grid to locate the user(s) whose access you would like to add. Use the check boxes by the users' name or **Select all/Unselect all** to select the user(s) you want to add to the LOI (Figure 13).
3. Once you have selected the user(s), click **Add All Users** at the bottom right of the page (Figure 13).

Manage Peer Access - Add User

Use the Search Filters to find the user(s) to add to this LOI. Click the "Add All Users" button to add the user(s) to the LOI. The user must already have a PAMS account to appear in the list. ([View Less](#))

LOI-0000000000: Title

Status: Submitted to DOE

FOA: DE-FOA-0000000: Solicitation Title

Institution: Institution Name, City, State

PI: Last Name, First Name

Submitted By: Last Name, First Name

Submitted On: 4/30/2019 03:37 PM ET

Due Date: 5/30/2019 05:00 PM ET

PM: Last Name, First Name

 Search

This page: [Select all](#) [Unselect all](#) 0 Persons Selected ([View](#)) Across pages: [Select all](#) [Unselect all](#)

Page size: 15 Go 4 items in 1 page(s)				
Select / Unselect	Name	Email	Phone Number	Role
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	SRO/BO/AO
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	Other
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	PI
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	Other
Page size: 15 Go 4 items in 1 page(s)				

[Return To List Page](#)

[Add All Users](#)

Figure 13. Manage Peer Access – Add User – By LOI

4. PAMS will return you to the "Manage Peer Access – User" page, follow steps 2 - 4 in section 3.2.1, Managing Peer Access for LOIs, to designate the appropriate privileges for the users you are adding to the Letter of Intent.

3.3 Managing My Proposals

Use the following steps to manage peer access for Proposals.

1. Click **View My Proposals** under the "Common Actions" section on the right side of the page ([Figure 14](#)).

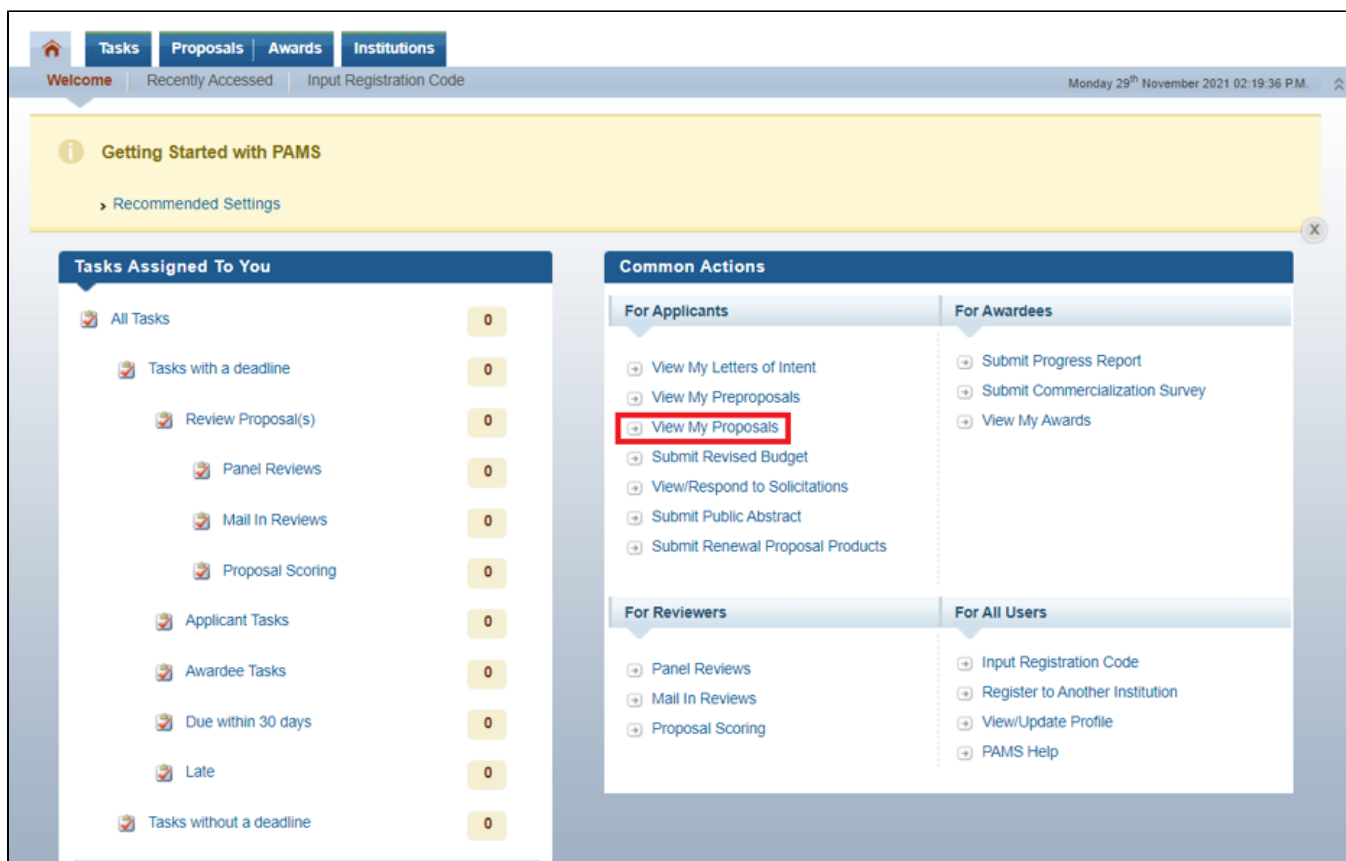


Figure 14. PAMS Homepage, View My Proposals

2. PAMS will navigate you to the “My Proposals” page, which displays all of the Proposals that are assigned to you in PAMS. Browse the list or use the filters or advanced search above the grid to locate the Proposals for which you would like to manage peer access. Once you have located the Proposal, click **Manage Peer Access** in the **Actions/Views** menu in the Options column (Figure 15).

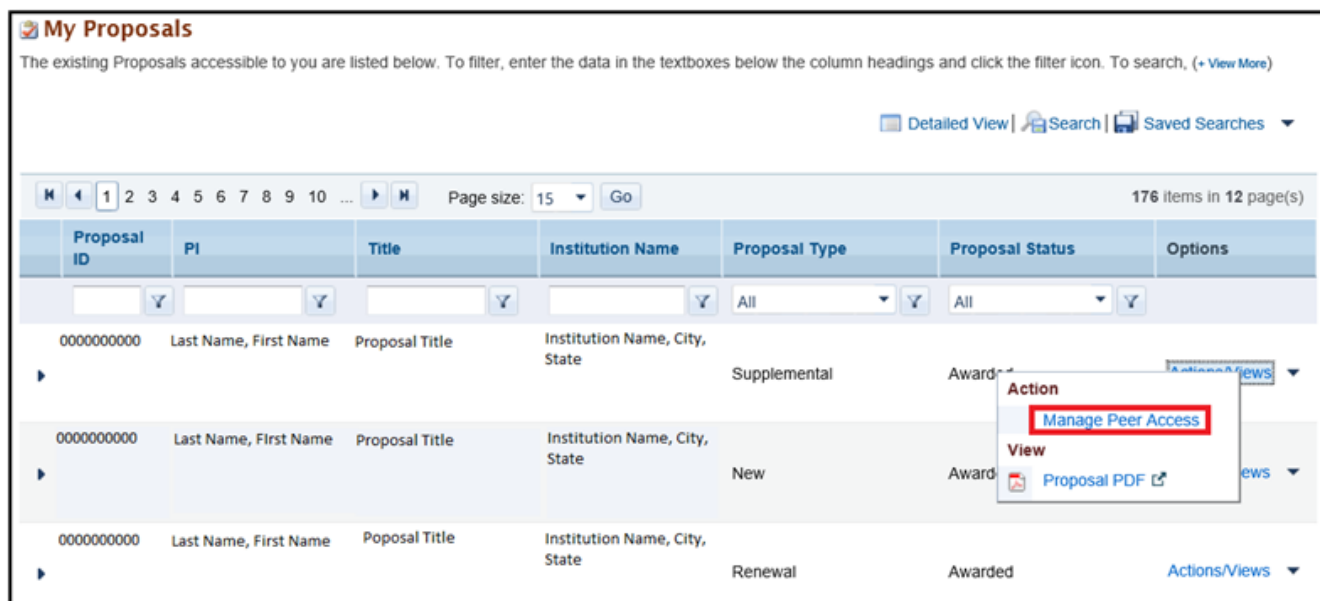


Figure 15. My Proposals, Manage Peer Access

3. PAMS will navigate you to the “Manage Peer Access – User List” page, which lists every user with access to the Proposal (Figure 16).

0000000000: Proposal Title
Status: Awarded

FOA: DE-FOA-0000000: Solicitation Title

Solicit

Progr:

Institution: Institution Name, City, State

Type: Supplemental

Submitted By: User, GrantsGov

PI: Last Name, First Name

Submitted On: 6/19/2020 07:39 AM ET

PM: Last Name, First Name

Due Date: 9/30/2020 11:59 PM ET

SRO/BO/AO: Last Name, First Name

Add New Person

Search

1

Page size: 15 Go

5 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Last Name, First Name	User Name	Email Address	000-000-0000	Other, PI	<div> <div>Action</div> <div>Manage Peer Access</div> <div>Remove from Proposal</div> </div>
Last Name, First Name	User Name	Email Address	000-000-0000	SRO/BO	
Last Name, First Name	User Name	Email Address	000-000-0000	Other, S	
Last Name, First Name	User Name	Email Address	000-000-0000	SRO/BO/AO	Actions
Last Name, First Name	User Name	Email Address	000-000-0000	Communication Contact, SRO/BO/AO	Actions

1

Page size: 15 Go

5 items in 1 page(s)

Return to List Page

Figure 16. Manage Peer Access – User List, Manage Peer Access

3.3.1 Managing Peer Access for Proposals

Use the following steps to manage a user who already has access to the Preproposal.

1. Browse the list or use the filters or advanced search above the grid to locate the user whose access you would like to manage. Once you have located the user, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 16).
2. PAMS will navigate you to the “Manage Peer Access – User” page, which displays the user’s current permissions on the Proposal. All users, including new users, on the Proposal will possess the View permission, but current users may also possess the Edit, Submit, Delete, or Manage Peer Access permissions. Select the checkbox for each additional permission you would like to grant the user(s) (Figure 17).
3. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page.

Manage Peer Access - User

This page enables you to add or remove proposal peer-access privileges for user(s). For the "Update Peer Access" section, click the appropriate checkbox next to the peer-access privilege to add it for the user. If the checkbox is already checked, clicking it again will remove the checkmark along with the user's privilege. Once you finish, click the Save and Continue button to save the changes. Click the Cancel button at any time to stop this action. (- [View Less](#))

☒ 0000000000: Proposal Title
 Status: Awarded

FOA: DE-FOA-0000000: Solicitation Title
 Institution: Institution Name, City, State

Type: Supplemental
 PI: Last Name, First Name
 PM: Last Name, First Name

Submitted By: User, GrantsGov
 Submitted On: 6/19/2020 07:39 AM ET
 Due Date: 9/30/2020 11:59 PM ET

SRO/BO/AO: Last Name, First Name

User Information

Names	First Name Last Name, First Name Last Name
The selected privileges will be assigned to all users shown above.	
Update Peer Access	<input checked="" type="checkbox"/> View
	<input type="checkbox"/> Edit
	<input type="checkbox"/> Submit
	<input type="checkbox"/> Delete
	<input type="checkbox"/> Withdraw
	<input type="checkbox"/> Edit Revised Budget
	<input type="checkbox"/> Submit Revised Budget To SRO
	<input type="checkbox"/> Manage Peer Access

Figure 17. Manage Peer Access – Users, Permissions

4. PAMS will return you to the "Manage Peer Access – User List" page and display a Success message confirming that the user's peer access privileges have been updated successfully (Figure 18).

Manage Peer Access - User List

Success:
Successfully updated peer access privileges.

Figure 18. Manage Peer Access – User List, Success

3.3.2 Adding a User to the Proposal

If you do not see the user whose access you would like to manage in the list (Figure 16), the user does not have access to the Proposal. Use the following steps to add a user to the Proposal.

1. Click **Add New Person** on the left above the grid to add one or more user(s) to the proposal and manage their access (Figure 16).
2. PAMS will navigate you to the "Manage Peer Access – Add User" page, which lists users from your Institution that do not currently have access to the Proposal. Browse the list or use the filters or advanced search above the grid to locate the user(s) whose access you would like to add. Use the checkboxes by the users' names or **Select all/Unselect all** to select the user(s) you want to add to the Proposal (Figure 19).
3. Once you have selected the user(s), click **Add All Users** at the bottom right of the page (Figure 19).

Manage Peer Access - Add User

Use the Search Filters to find the user(s) to add to this proposal. Click the "Add All Users" button to add the user(s) to the proposal. The user must already have a PAMS account to appear in the list.

▼ 0000000000: Proposal Title

Status: Awarded

FOA: DE-FOA-000000000: Solicitation Title

Institution: Institution Name, City, State

Type: Supplemental

PI: Last Name, First Name

PM: Last Name, First Name

Submitted By: User, GrantsGov

Submitted On: 6/19/2020 07:39 AM ET

Due Date: 9/30/2020 11:59 PM ET

SRO/BO/AO: Last Name, First Name

Search

This page: [Select all](#) [Unselect all](#) 0 Persons Selected (View) Across pages: [Select all](#) [Unselect all](#)

Page size: 15
4 items in 1 page(s)

Select / Unselect	Name	Email	Phone Number	Role
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	SRO/BO/AO
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	Other
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	PI
<input type="checkbox"/>	Last Name, First Name	Email Address	000-000-0000	Other

Page size: 15
4 items in 1 page(s)

[Return To List Page](#)
[Add All Users](#)

Figure 19. Manage Peer Access – Add User – By Proposal

4. PAMS will return you to the "Manage Peer Access – User" page, follow steps 2 - 4 in section 3.3.1, Managing Peer Access for Proposals, to designate the appropriate privileges for the users you are adding to the Proposal.

3.4 Managing My Awards

Use the following steps to manage peer access for Awards.

1. Click **View My Awards** under the "Common Actions" section on the right side of the page (Figure 20).

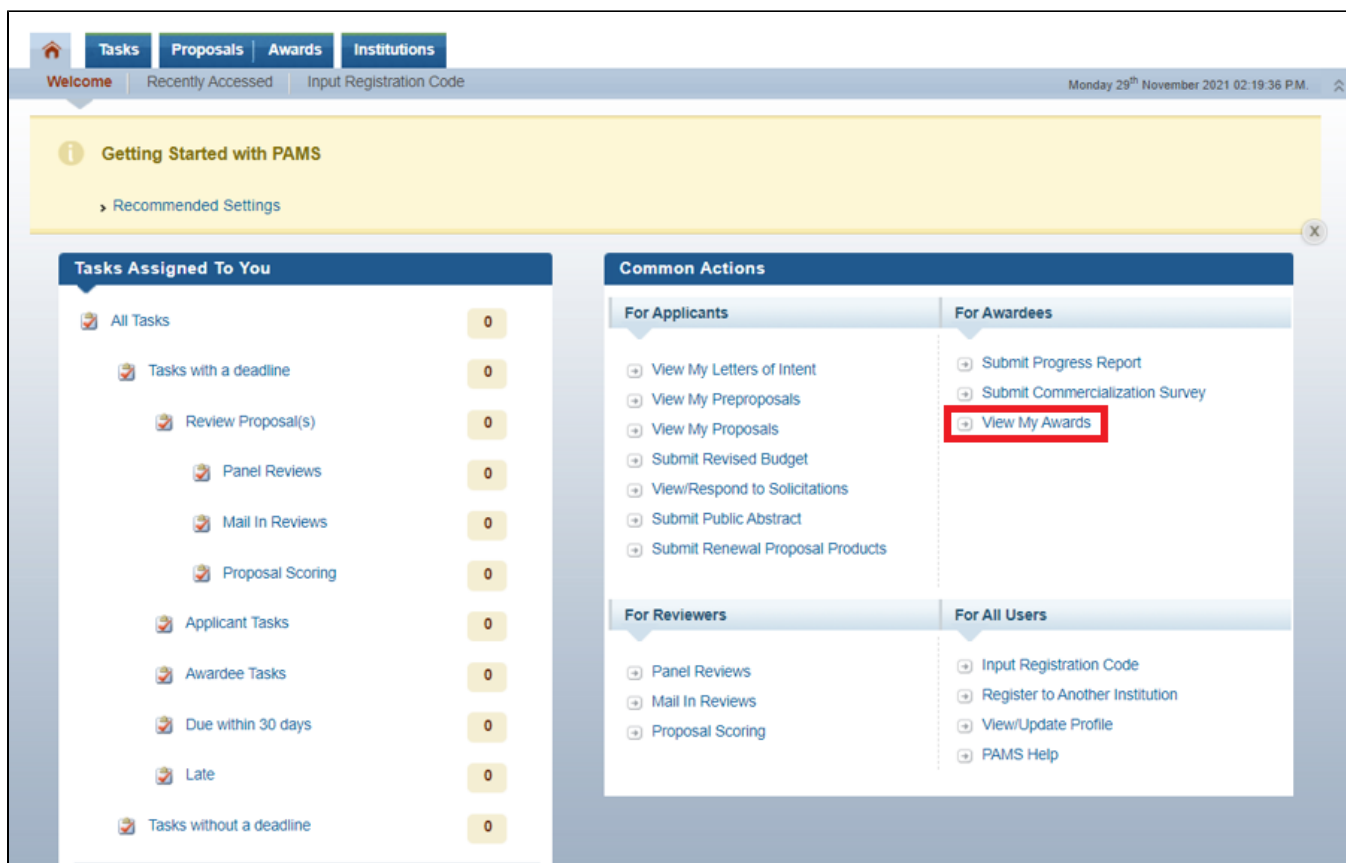


Figure 20. PAMS Homepage, View My Awards

2. PAMS will navigate you to the "My Awards – List" page, which displays all of the Awards that are assigned to you in PAMS. Browse the list or use the filters or advanced search above the grid to locate the Award for which you would like to manage peer access. Once you have located the Award, click **Manage Users** in the **Actions/Views** menu in the Options column (Figure 21).

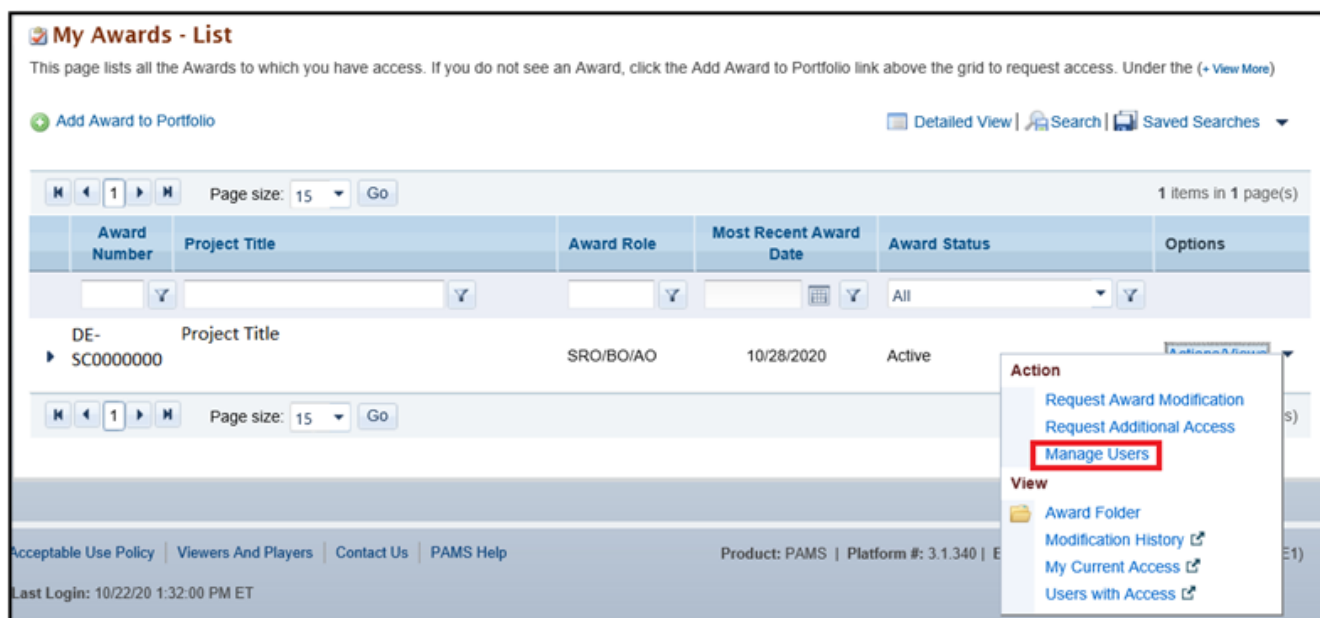


Figure 21. My Awards – List, Manage Users

3. PAMS will navigate you to the “Users – List” page, which lists every user with access to the Award (*Figure 22*).

Users - List

This page lists all of the users who have access to the Award. To add a new user, click the Add New User link on the left side of the screen and above the grid. To change access for an existing user, click the Actions/Views link and the Update link. The Update link will not be displayed if an award access request for the user is pending approval. To review and make a decision on the access request, click the Actions/Views link and Approve/Disapprove link. To remove a user from the award, click the Actions/Views link and the Remove link. (- View Less)

DE-000000000: [Award Title]
Award Status: Active

Institution: [Institution Name, City, State]
Most Recent Award Date: 09/21/2021
Current Budget Period: 07/01/2021 - 06/30/2022
Amount Awarded this Budget Period: \$400,000.00

UEI: N/A
Number of Support Years: 4
Current Project Period: 07/01/2021 - 06/30/2023
Supplement Budget Period: N/A

DUNS: 0000000000
PM: [LastName, FirstName]
PI: [LastName, FirstName]

Resources
View
Program Contact Info | Public Abstract
Add New User

1
Page size: 15
Go
3 items in 1 page(s)

Name	Email	Phone Number	Award Access	Role	Options
[LastName, FirstName]	[Email Address]	(000) 000-0000	Approved		<div> <div> <div> <div> Update </div> </div> <div> <div> Remove </div> </div> <div> <div> View </div> </div> <div> <div> Current Access </div> <div> Action History </div> </div> </div> </div>
[LastName, FirstName]	[Email Address]	(000) 000-0000	Approved		<div> <div> <div> <div> Update </div> </div> <div> <div> Remove </div> </div> <div> <div> View </div> </div> <div> <div> Current Access </div> <div> Action History </div> </div> </div> </div>
[LastName, FirstName]	[Email Address]	(000) 000-0000	Approved		<div> <div> <div> <div> Update </div> </div> <div> <div> Remove </div> </div> <div> <div> View </div> </div> <div> <div> Current Access </div> <div> Action History </div> </div> </div> </div>

1
Page size: 15
Go
3 items in 1 page(s)

Figure 22. Users – List, Update

3.4.1 Manage Peer Access for Awards

Use the following steps to manage a user who already has access to the Award.

1. Browse the list or use the filters or advanced search above the grid to locate the user whose access you would like to manage. Once you have located the user, click **Update** in the **Actions/Views** menu in the Options column (Figure 22).
2. PAMS will navigate you to the "Awards – Update User Access" page, which displays the user's current permissions on the Award. All users, including new users, on the Award will possess the View permission, but current users may also possess the Create, Edit, Submit, Delete, and Administer permissions. Select the checkbox for each additional permission for Award Modification Requests you would like to grant the user (Figure 23).
3. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page.

Awards – Update User Access

This page enables you to add or remove award peer-access privileges for user(s). For each of the three Award sections—Progress Reports, Award Modification Requests, and Award Level—click the appropriate checkbox next to the peer-access privilege to add it for the user. If the checkbox is already checked, clicking it again will remove the checkmark along with the user's privilege. Once you finish, click the Save and Continue button to save the changes. Click the Cancel button at any time to stop this action. ([View Less](#))

DE-0000000000: [Award Title] Award Status: Active

Institution: [Institution Name, City, State]	UEI: N/A	DUNS: 0000000000
Most Recent Award Date: 09/21/2021	Number of Support Years: 4	PM: [LastName, FirstName]
Current Budget Period: 07/01/2021 - 06/30/2022	Current Project Period: 07/01/2021 - 06/30/2023	PI: [LastName, FirstName]
Amount Awarded this Budget Period: \$400,000.00	Supplement Budget Period: N/A	

Resources [View](#)

Program Contact Info | Public Abstract

User Information

Name	[LastName, FirstName]
Email	[Email Address]
Award Role	Other

Manage User Access (Select all | Unselect all)

Progress Reports + <small>(must be approved by the PI or for SBIR/STTR awards by the BO)</small>	<input checked="" type="checkbox"/> View + <input checked="" type="checkbox"/> Submit +	<input checked="" type="checkbox"/> Edit + <input type="checkbox"/> Administer +
Award Modification Requests + <small>(must be approved by the SRO/BO/IO)</small>	<input type="checkbox"/> View + <input type="checkbox"/> Submit +	<input type="checkbox"/> Create + <input type="checkbox"/> Delete + <input type="checkbox"/> Edit + <input type="checkbox"/> Administer +
Award Level + <small>(must be approved by either the PI or SRO/BO/IO)</small>	<input checked="" type="checkbox"/> View Only +	

Cancel Save and Continue

Figure 23. Awards – Update User Access, Permissions

4. PAMS will return you to the “User – List” page and display a Success message confirming that the user’s access has been updated successfully (Figure 24).

Users - List

This page lists all of the users who have access to the Award. To add a new user, click the Add New User link on the left side of the screen and above the grid. To change access for an existing user, click the Actions/Views link and the Update link. The Update link will not be displayed if an award access request for the user is pending approval. To review and make a decision on the access request, click the Actions/Views link and Approve/Disapprove link. To remove a user from the award, click the Actions/Views link and the Remove link. ([View Less](#))

Success:
User access has been updated successfully.

Figure 24. Awards – Success

3.4.2 Adding a User to the Award

If you do not see the user whose access you would like to manage in the list (Figure 22), the user does not have access to the Award. Use the following steps to add a user to the Award.

1. Click **Add New Person** on the left above the grid to add one or more user(s) to the Award and manage their access (Figure 22).
2. PAMS will navigate you to the “Awards – Add User” page, which lists users from your institution that do not currently have access to the Award. Browse the list or use the filters or advanced search above the grid to locate the user(s) whose access you would like to add. Use the checkboxes by the users’ names or **Select all/Unselect all** to select the user(s) you want to add to the Award (Figure 25).
3. Once you have selected the user(s), click **Add All Users** at the bottom right of the page (Figure 25).

Awards - Add User

Use the Search Filters to find the user(s) to add to this award. Click the "Add All Users" button to add the user(s) to the award. The user must already have a PAMS account to appear in the list. ([View Less](#))

DE-0000000000: [Award Title]
Award Status: Active

Institution: [Institution Name, City, State]
Most Recent Award Date: 09/21/2021
Current Budget Period: 07/01/2021 - 06/30/2022
Amount Awarded this Budget Period: \$400,000.00

UEI: N/A
Number of Support Years: 4
Current Project Period: 07/01/2021 - 06/30/2023
Supplement Budget Period: N/A

DUNS: 0000000000
PM: [LastName, FirstName]
PI: [LastName, FirstName]

Resources
View
Program Contact Info
Public Abstract

Search
Saved Searches

This page:
Select all
Unselect all
2 Users Selected (View)
Across pages:
Select all
Unselect all

Page size: 15
Go
4 items in 1 page(s)

Select / Unselect	Name	Email	Phone Number	Role
<input checked="" type="checkbox"/>	[LastName, FirstName]	[Email Address]	(000) 000-0000	PI, Other
<input checked="" type="checkbox"/>	[LastName, FirstName]	[Email Address]	(000) 000-0000	PI, Other
<input type="checkbox"/>	[LastName, FirstName]	[Email Address]	(000) 000-0000	PI, Other
<input type="checkbox"/>	[LastName, FirstName]	[Email Address]	(000) 000-0000	Other

Page size: 15
Go
4 items in 1 page(s)

Cancel
Add All Users

Figure 25. Awards – Add User

4. PAMS will return you to the "Awards – Add User Access" page, follow steps 2 - 4 in section 3.4.1, Managing Peer Access for Awards, to designate the appropriate privileges for the users you are adding to the Proposal.

3.5 Institution – Manage Users

If you do not want to manage users' peer access by resource, you can also manage users at the institution level. Use the following steps to manage users from the Institution Tab.

1. To manage a user by institution, navigate to the Institutions tab ([Figure 26](#)).

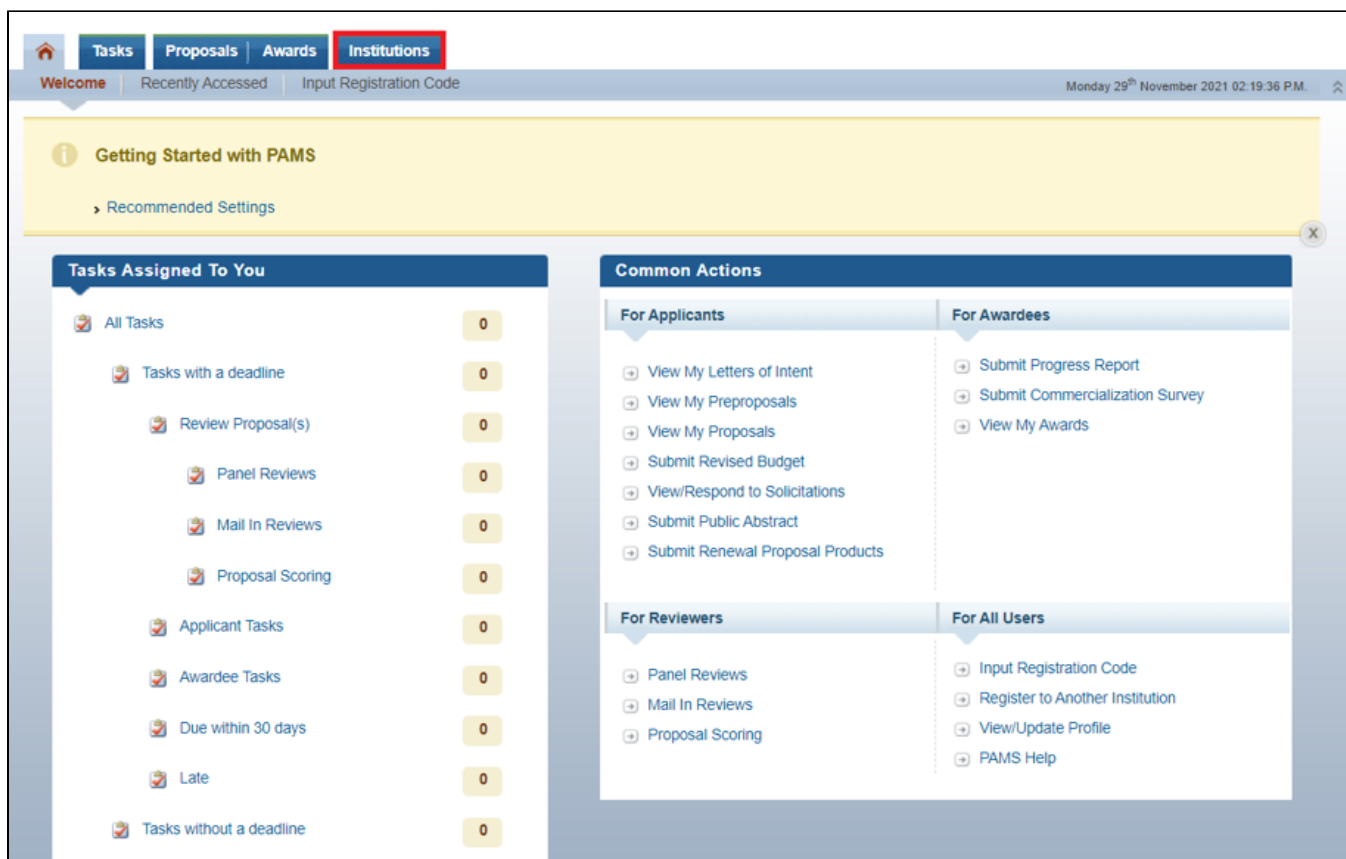


Figure 26. PAMS Homepage – Institutions Tab

2. PAMS will load the "Institutions – List" page, which displays all of the institutions you are registered to in PAMS. Choose an institution and select **Manage Users** in the **Actions/Views** menu in the Options column (Figure 27).

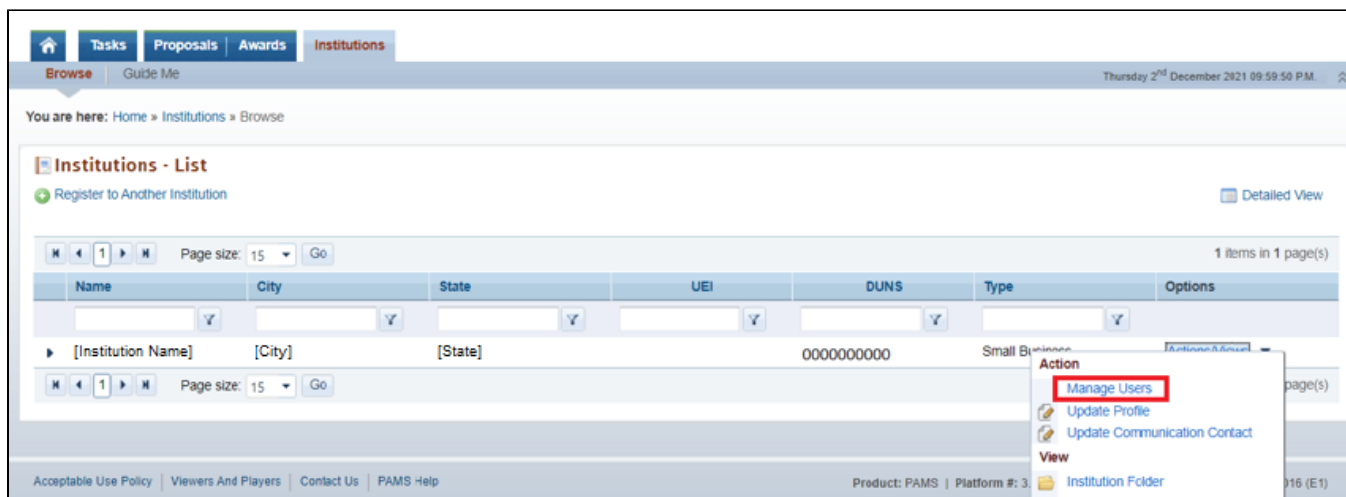


Figure 27. Institution – List, Manage Users

3. PAMS will navigate to the "Manage Users" page. There are five Manage Users options: **By Letter of Intent**, **By Preproposal**, **By Proposal**, **By Award**, and **By Users**. To perform one of these Manage Users actions, click the magnifying glass for the resource of choice (Figure 28).

Manage Users

How would you like to Manage Peer Access? (To see all results, click search with empty search fields)

- ☒ By Letter of Intent
- ☐ By Preproposal
- ☐ By Proposal
- ☐ By Award
- ☐ By Users

Figure 28. Manage Users

3.5.1 By Letter of Intent

Upon selecting **By Letter of Intent** on the “Manage Users” page, PAMS will load search parameters.

1. Enter the LOI Tracking Number, Project Title (like), or Solicitation Number (like), and click **Search** to narrow your LOI results
OR
Click **Search** with no parameter to search all LOIs submitted by your institution ([Figure 29](#)).

Manage Users

How would you like to Manage Peer Access? (To see all results, click search with empty search fields)

☒ By Letter of Intent
 Tracking Number
 Project Title like
 Solicitation Number like

- ☐ By Preproposal
- ☐ By Proposal
- ☐ By Award
- ☐ By Users

Figure 29. Manage Users, By Letter of Intent

2. PAMS will navigate to the “Manage Users – Letters of Intent” page. Browse the list or use the filters or advanced search above the grid to locate the LOI for which you would like to manage peer access. Once you have located the LOI, click **Manage Peer Access** in the **Actions** menu in the Options column ([Figure 30](#)).

Manage Users - Letters of Intent

▼ Institution Name, City, State

DUNS: 0000000000 EIN: 0000000000 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): Last Name, First Name

Detailed View | Search | Saved Searches ▼

Page size: 15 Go 63 items in 5 page(s)

Tracking Number	Title	Institution	Status	Options
LOI-0000000000	LOI Title	Institution Name, City, State	Submitted to DOE	Actions Manage Peer Access
LOI-0000000000	LOI Title	Institution Name, City, State	Submitted to DOE	Actions
LOI-0000000000	LOI Title	Institution Name, City, State	Submitted to DOE	Actions

Figure 30. Manage Users – Letters of Intent, Manage Peer Access

3. Refer to [Section 3.2 Managing My Letters of Intent](#), steps 3-6 above.

3.5.2 By Preproposal

Upon selecting **By Preproposal** on the "Manage Users" page, PAMS will load search parameters.

1. Enter the Preproposal Tracking Number, Project Title (like), or Solicitation Number (like), and click **Search** to narrow your preproposal results
OR
Click **Search** with no parameters to search all Preproposals submitted by your institution (Figure 31).

Manage Users

How would you like to Manage Peer Access? (To see all results, click search with empty search fields)

By Letter of Intent

By Preproposal

Tracking Number

Project Title like

Solicitation Number like

Cancel Search

By Proposal

By Award

By Users

Cancel

Figure 31. Manage Users By Preproposal

2. PAMS will navigate to the “Manage Users – Preproposals” page. Browse the list or use the filters or advanced search above the grid to locate the Preproposal for which you would like to manage peer access. Once you have located the Preproposal, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 32).

Manage Users - Preproposals

▼ Institution Name, City, State

DUNS: 000000000 EIN: 000000000 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): Last Name, First Name

Detailed View | Search | Saved Searches ▼

Page size: 100 Go 1 items in 1 page(s)

Tracking Number	Title	Institution	Status	Options
PRE-0000000000	Preproposal Title	Institution Name, City, State	Encouraged	Action Manage Peer Access

Cancel

Figure 32. Manage Users – Preproposals, Manage Peer Access

3. Refer to [Section 3.1 Managing My Preproposals](#), steps 3-6 above.

3.5.3 By Proposal

Upon selecting **By Proposal** on the “Manage Users” page, PAMS will load search parameters.

- 1. Enter the Agency Tracking Number, [Grants.gov](#) Tracking Number, Project Title (like), or Solicitation Number (like), and click **Search** to narrow your Proposal results
- OR
- Click **Search** with no parameters to search all Proposals submitted by your institution (Figure 33).

Manage Users

How would you like to Manage Peer Access? (To see all results, click search with empty search fields)

By Letter of Intent

By Preproposal

By Proposal

Agency Tracking Number: [] Grants.gov Tracking Number: []

Project Title like: []

Solicitation Number like: []

Cancel Search

By Award

By Users

Cancel

Figure 33. Manage Users, By Proposal

2. PAMS will navigate to the “Manage Users – Proposals” page. Browse the list or use the filters or advanced search above the grid to locate the Proposal for which you would like to manage peer access. Once you have located the Proposal, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 34).

Manage Users - Proposals

▼ Institution Name, City, State

DUNS: 000000000

EIN: 000000000

Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): Last Name, First Name

Detailed View

Search

Saved Searches ▼

<div> <div>⏪</div> <div>⏩</div> <div>1</div> <div>⏪</div> <div>⏩</div> </div> <div>Page size: 15 Go</div> <div>3 items in 1 page(s)</div>						
Proposal ID	PI	Title	Institution Name	Proposal Type	Proposal Status	Options
0000000000	Last Name First Name	Proposal Title	Institution Name, City, State	New	Submitted to DOE	<div>Actions</div> <div>Manage Peer Access</div>

Figure 34. Manage Users – Proposals, Manage Peer Access

3. Refer to [Section 3.3 Managing My Proposals](#), steps 3-6 above.

3.5.4 By Award

Upon selecting **By Award** on the “Manage Users” page, PAMS will load search parameters.

1. Enter the Award Number (like) or Award Title (like) and click **Search** to narrow your Award results

OR

Click **Search** with no parameters to search all Awards for your institution (Figure 35).

Manage Users

How would you like to Manage Peer Access? (To see all results, click search with empty search fields)

☒ By Letter of Intent

☐ By Preproposal

☐ By Proposal

☒ By Award

Award Number Award Title like:

like:

☐ By Users

Figure 35. Manage Users, By Award

2. PAMS will navigate to the “Manage Users – Awards” page. Browse the list or use the filters or advanced search above the grid to locate the Award for which you would like to manage peer access. Once you have located the Award, click **Manage Peer Access** in the **Actions** menu in the Options column (Figure 36).

Manage Users - Awards

All awards matching your search criteria are listed below. To grant access to an award, click the arrow in the "Options" column and select the "Manage Peer Access" link. To designate an award's SRO/BO/AO, click the arrow in the "Options" column and select the "Change Award SRO/BO/AO" link. (- View Less)

▼ [Institution Name, City, State]

UEI: N/A
Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): [LastName, FirstName]

DUNS: 00000000 Institution Type: Small Business
EIN: 00000000000

Detailed View | Search | Saved Searches ▼

◀ 1 ▶ Page size: 15 Go

1 items in 1 page(s)

Award Number	Project Title	Most Recent Award Date	Award Status	Options
DE-00000000	[Project Title]	10/27/2021	Active	<div>Action<ul style="list-style-type: none">Manage Peer AccessChange Award SRO/BO/AO</div>

◀ 1 ▶ Page size: 15 Go

Cancel

Figure 36. Manage Users – Awards, Manage Peer Access

3. Refer to [Section 3.4 Managing My Awards](#), steps 3-6 above.